

## CHECKLIST: TERMINATION/RETIREMENT

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Name: \_\_\_\_\_ Empl ID: \_\_\_\_\_

Termination/Retirement Effective Date: \_\_\_\_\_

- UPDATE JOB DATA** *Role: Agency HR Specialist*  
Navigation: **Main Menu > Workforce Administration > Job Information > Job Data**  
Enter Termination/Retirement/Completion Action/Action Reason job row.
  
- ADJUST AND INACTIVATE TIME** *Role: Time and Labor Specialist*
  - Identify Time Reporters with Time after Termination/Retirement Date**  
Navigation: **Main Menu > Reporting Tools > Query > Query Manager**  
Query: **WI\_TERM\_W\_TIME**
  - Adjust Timesheet Entries**  
Navigation: **Main Menu > Manager Self Service > Report Time > Timesheet**
  - Update Time Reporter Data**  
Navigation: **Main Menu > Time and Labor > Enroll Time Reporters > Maintain Time Reporters**  
Set Rule Element 1 and Rule Element 4 to CASH and in activate Time Reporter Data.
  - Calculate Comp Time Payout Balances**  
Navigation: **Main Menu > Time and Labor > View Time > Compensatory Time**  
Calculate Comp Time payout and send to Payroll.
  
- REVIEW AND ADJUST LEAVE BALANCES** *Role: Agency Absence Specialist*  
Navigation: **Main Menu > Global Payroll & Absence Mgmt > Payee Data > Maintain Absences > Review Absence Balances**  
Identify leave balances and note whether to payout unused earned leave or if the leave is overdrawn.
  
- DELETE FUTURE DATED LEAVE ENTRIES** *Role: Agency Absence Specialist*
  - Search for and delete future dated entries**  
Navigation: **Main Menu > Global Payroll & Absence Mgmt > Payee Data > Maintain Absences > Absence Event**
  - Verify no entries exist after termination**  
Navigation: **Main Menu > Reporting Tools > Query > Query Manager**  
Query: **WI\_TERMINATED\_WITH\_ABSENCE**
  
- PAYOUT/COLLECT LEAVE (IF APPLICABLE)** *Role: Agency Payroll Specialist*  
Navigation: **Main Menu > State of Wisconsin (STAR) > Payroll > Process > Enter Payroll One Time Trans**  
Process leave payouts or collections.
  
- SET FINAL PAYCHECK TO PRINT** *Role: Agency Payroll Specialist*

Navigation: **Main Menu > Payroll for North America > Employee Pay Data USA > Request Direct Deposit**

- END GENERAL DEDUCTIONS** *Role: Agency Payroll Specialist*  
Navigation: **Main Menu > Payroll for North America > Employee Pay Data USA > Deductions > Create General Deductions**

- END ADDITIONAL PAY** *Role: Agency Payroll Specialist*  
Navigation: **Main Menu > Payroll for North America > Employee Pay Data USA > Create Additional Pay**

- VERIFY PAY FOR EXCEPTION TIME REPORTERS** *Role: Agency Payroll Specialist*  
Navigation: **Main Menu > Payroll for North America > Payroll Processing USA > Produce Payroll > Review Paycheck**  
Verify pay calculated appropriately for time worked in last pay period.

- INACTIVATE DIRECT DEPOSIT (AFTER LAST PAYROLL CONFIRMED BY CP)** *Role: Agency Payroll Specialist*  
Navigation: **Main Menu > Payroll for North America > Employee Pay Data USA > Request Direct Deposit**

- REQUEST GARNISHMENT SUSPENSION** *Role: Agency Payroll Specialist*  
Notify Garnishment team.

- FINALIZE TERMINATION-RELATED BENEFITS EVENT** *Role: Agency Benefits Specialist*  
Navigation: **Main Menu > Benefits > Manage Automated Enrollment > Events > Update Event Status**

**Reminders:**

- Any life insurance refund will be automatically generated if termination within the past 90 days
- Confirm that the employee is going to be on payroll long enough to collect the full month of premiums for the employee's last month of coverage – request POTTs as needed
- Reconcile benefit deductions and WRS contributions for the current year – request POTTs as needed
- Evaluate any arrears for the employee and if they need to be zeroed out or changed for the final payroll

- VERIFY BENEFITS TERMINATION** *Role: Agency Benefits Specialist*  
*Health* – Navigation: **Main Menu > Benefits > Enroll in Benefits > Health Benefits.**  
*Life, AD&D* – Navigation: **Main Menu > Benefits > Enroll in Benefits > Life and AD/D Benefits.**  
*Disability* – Navigation: **Main Menu > Benefits > Enroll in Benefits > Disability Benefits**  
*Retirement* – Navigation: **Main Menu > Benefits > Enroll in Benefits > Retirement Plans**

- SEND COBRA/CONTINUATION NOTICES AS APPLICABLE** *Role: Agency Benefits Specialist*